



- Daniels launches video store chain
- Legislation may thwart CRT rate hike
- AT&T reveals divestiture details
- Milwaukee MDS vanquishes video pirate

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Special report New year, old headaches

Compiled by *CableVision* writers and editors in New York, Washington, Denver and Los Angeles, this special report looks back at 1982, a year of dramatic success and disappointment, and ahead to 1983, what many expect will be a year of more moderate but steady growth. It will be a "difficult" year, analysts and cable leaders say, but "the worst may be over." Now that its overzealous, "blue-sky" optimism is tampered, the industry can regain Wall Street's confidence and secure advertisers' support. Programming's "shakeout," which began in late summer with CBS Cable's demise, will continue, but new services will launch. Franchising is stalled in major urban centers, although medium-sized cities are moving forward. Operators will turn to retention marketing and winning over "untouchables." Advertisers will succumb to cable as researchers develop more reliable methods of audience measurement. And suppliers are continuing to attack technical obstacles to growth in pay-per-view and two-way interactive services. **Pages 27-42.**

Bell breakup described

The telecommunications giant releases details of its structure under court-supervised divestiture. **Leading the week, pages 13-22.**

Pa. Bellwether

Bell of Pennsylvania proposed to subcontract construction and some operations for cable systems in Philadelphia. **Leading the week, pages 13-22.**

Warner reeling

Warner Communications stock price falls for the second consecutive week after it scales down its earnings projections. **Leading the week, pages 13-22.**

Desert rendezvous

NCTA's board of directors meets at California resort to discuss copyright, cable cross-ownership and other hot topics. **Leading the week, pages 13-22.**

The bids are in

Minority-controlled firms were the lone bidders for the Motor City's 460,000-home franchise. **Leading the week, pages 13-22.**

HBO price is rising

Home Box Office will raise its rates to affiliates next summer. **Leading the week, pages 13-22.**

Copyright counterattack

WGN, WOR and WTBS prepare marketing strategy to retain system affiliates after higher copyright royalty fees are imposed Jan. 1. **Leading the week, pages 13-22.**

Student video

USA Network's *Night Flight* will present no-holds-barred film and video works by college students selected after a nationwide search. New on-air promotions and ad rates also are planned. **Page 68.**

Arbitron says

Recent figures show cable penetration surpassed 30 percent in 1982, good news to cable marketers and ad salesmen. **Page 73.**

Basic rate hike

Cable Atlanta proposes \$12/month rate to offset higher-than-expected construction and operating costs. **Page 75.**

Computer II day

Starting Jan. 1, telephone companies can provide unregulated, enhanced services. **Page 85.**

This week in PLUS

The STV window is closing. Time, Cox, Wometco and Home Entertainment Network rethink their involvement in the medium and are finding that there may be "no painless way out." Optimists discuss multichannel STV while those who are less hopeful think about selling. But with so many eager sellers, who's going to do the buying? . . . The Tribune Co. makes up for lost time and becomes a cable force to be reckoned with. For many years, the company's cable efforts were less than wholehearted, but under Doug Dittick's direction, Tribune has entered the cable big leagues in no time at all and now has a remarkable string of franchise victories to its credit. **Pages 43-66.**

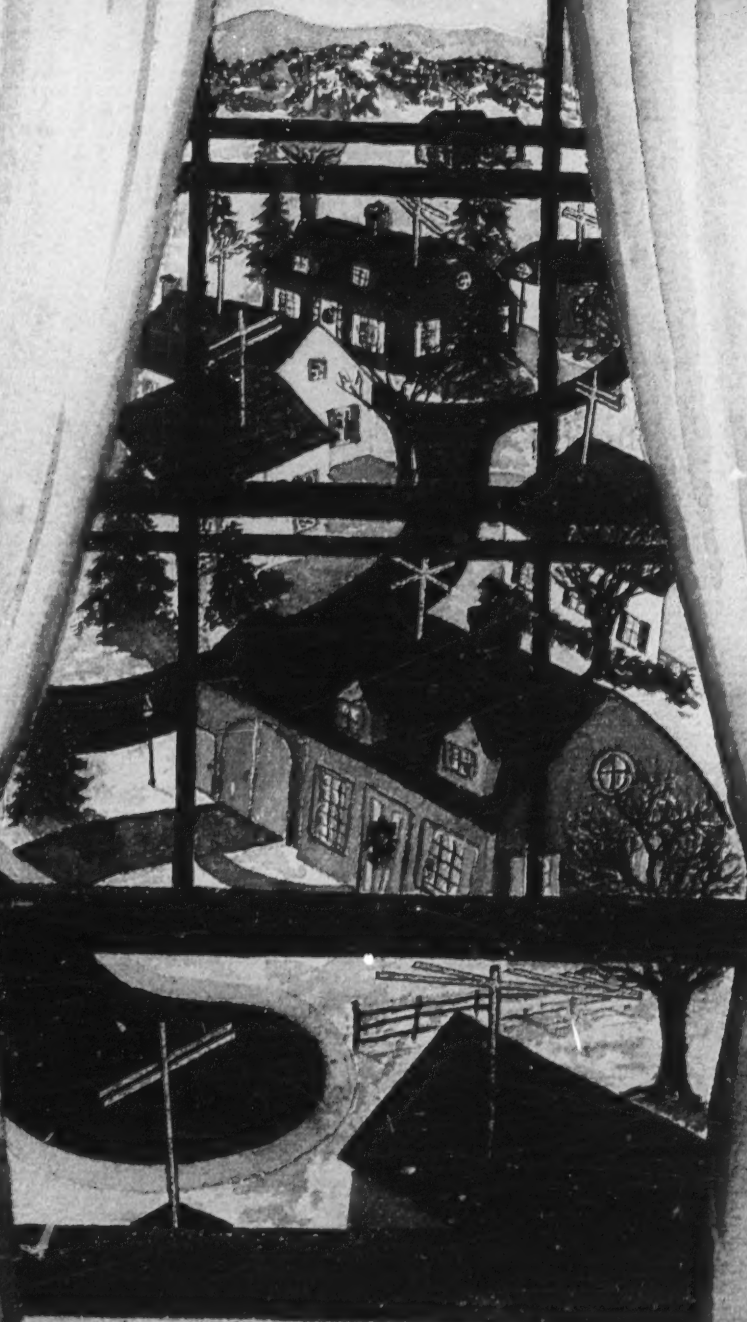
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Is the STV window closing?



C. CARLEY

Four MSOs and MSO parents reassess their STV involvement

By Jerl Baker



'No sophisticated company could have come up with any different analysis of STV's future than we did.'

Nathan Garner,
president,
Preview STV Inc.

To all of them, it was an acknowledged fast-buck play, a quick fix. More decorously put, subscription television* appeared to Time Inc.'s ATC, Cox Communications, United Cable and Wometco Enterprises as a bridge into uncabled major markets eager for even a single channel of pay television.

Now, "STV may become a long-term business for all of us because there is just no painless way out," as Time Inc.'s rueful Preview STV President Nathan Garner remarked recently.

*STV is pay television transmitted over broadcast TV. The signal is scrambled, requiring a decoder in the subscriber's home. STV programming is similar to pay cable's and consists mainly of first-run movies, entertainment specials and sports events.

All else being equal, the bridge still might be sturdy, though big cities are being franchised at a clip more brisk than planners predicted in the mid-'70s.

But the core of their assumption was that this interim business would be easy to build, easy to recoup, easy to reposition if cable ever came along.

That has proved untrue. There is now a chorus of concern from the quartet of MSOs and MSO parents who account for something under 15 percent of STV's 1.9 million homes.

Disconnects, cable encroachment, piracy, intramarket competition—all contributed to the malaise apparent at the STV Association annual meeting last month in Los Angeles. It was a bleak gathering whose highest point, perhaps, was the call for a period of "introspection," "discipline" and "challenging the basic structure of the business." It came from Jack Wyant, the group's new chairman and the president of Home Entertainment Network, which is 80 percent owned by United Cable. Wyant is far and away the most optimistic of the strategists contacted by *CableVision Plus*.

Accurate palm reading

Few developments in pay TV were ever so thoroughly predicted as was STV's short lifespan. The consistent description of the business before it ever became a business was of a "window." That the window would close as cable competition advanced was accepted wisdom. Some companies have changed their minds, largely based on ON TV's continued strength in recently cabled Los Angeles.

But the four companies profiled here devoutly believe in cable superiority. All four have reached their current level of concern by different routes, and all have different scenarios for the future of their piece of the business. But all now share the same focus on profits, replacing a go-for-growth syndrome that goaded earlier decisions.

What prompts the universal attention to cost control is something the early analyses failed to account for: Many believe the time has come to exit, earlier than planned if a buyer can be found, and with fewer profits than planned if a buyer cannot be found.

But if so many sellers are heading out the same door—or window, in this case—who is left to buy?

STV broker Mike Klein says frankly of his current efforts, "STV

has a stigma now that slows the buying decision. Almost everyone inside the business has soured on it. You have to go outside—and that's a tremendous education job when all they ask is, 'How come so many haven't ever made STV work?'"

Is this the end of STV's road? Or is it the middle of its route to new formats, new alliances, new life?

Here's the way each company gauges the distance.

Timing is all

Of those that hedged their cable bets with STV investments, veterans Time Inc. and Wometco Enterprises were first to show their regrets in public.

Preview, the three-market STV operation begun by ATC, was pulled from the MSO's Denver headquarters to corporate stewardship in New York early this year. Soon afterward, in a move telegraphed months earlier by former ATC Chairman Monroe Rifkin, Time STV chief Thayer Bigelow was talking openly of the decision to sell all three broadcast pay operations. (Bigelow, now the corporation's treasurer, had at that time just closed down Time Life Films; Nate Garner was vice president and general manager in charge of that folding.)

Negotiations were already underway with Golden West, with whom Time and Oak Media were battling for pieces of Dallas' overpopulated STV market. Sale of the Preview operation there was concluded in September.

That left Time with Boston, where another, older STV channel also is available (and also for sale), and with Cleveland, where the suburbs within Preview's market are heavily cable-penetrated.

As Garner says, there's no line at either door. "No sophisticated company could have come up with any different analysis of STV's future than we did."

What is certainly most galling to Time Inc. is that the original STV analysis done by ATC had all the benefit of the MSO's experience in cable. Time and others thought it was the logical touchstone. And it was the wrong one, they have since discovered.

Also working to Time's disadvantage was the opposition of the major film studios to its ownership of the UHF stations that would carry its STV programming. Paramount, Columbia, MCA, MGM and United Artists went to

court in Chicago in September 1979 to block the transfer of STV-licensed WSNS-TV. They charged that it was simply the first step of Time Inc.'s strategy to enhance the control of pay TV distribution by its pay network, HBO.

"We knew we'd never get a purchase past them," said a veteran ATC planner, "so we had to lease time from other station owners"—at a million-dollar hike in operations costs in every market.

At that point, Time Inc. considered HBO vulnerable enough to the studios' wrath to abandon its STV programming ambitions. Its only client, Oak, already had thought better of the alliance and switched to self-programming. The original strategists then planned an ATC-managed stand-alone program service to sell to non-ATC affiliates but grumbled that HBO's lack of involvement kept licensing costs twice as high as pay cable's. (The stand-alone service did, at length, win one taker: Cox Communications called its St. Louis STV operation "Preview" in expectation of programming from ATC. By the time Cox launched last June, Time Inc. had folded that business, too.) HBO does license an occasional film or special to the STV industry, but a spokesman characterized the sales as "tiny." And as for Time's Preview, current managers, obviously sensitive to the old vertical integration charge, put the sum total of product licensed from its HBO sibling as "under 10 percent."

It was disconnects, brought on by that marketwide surge of demand that no early STV operator ever anticipated, that pushed costs per sale from an initial \$12 to \$150 just six months later.

Plus and minus

Time had one singular advantage that had helped bring it into STV in the first place.

ATC had developed and licensed to Zenith the technology for the SSAVI decoder. Its popularity among STV operators has grown steadily. The box had been aimed at cable, but planners quickly perceived its adaptability to STV.

Like ATC's Denver MDS operation, the nation's largest, the equipment venture is expected to be a business tangent with a payoff. Time Inc. has a substantial margin on the boxes it sells directly to STV systems, and it gets a royalty payment on the version Zenith itself sells to cable.

Preview (Time Inc.)

Cleveland

ADI: 1.3 million
Homes passed by cable: 775,000
Unfranchised homes: 220,000
STV launch: 3/81
Subscribers: 27,000 (CV est.)
Disconnects: 4% per month
Monthly growth: 0
Fees: Basic tier—\$21.95
 Adult tier—\$4.95
Hours: weekdays—8 p.m.-7 a.m.,
 weekends—3 p.m.-6 a.m.
 (Sun. -1 a.m.)
Equipment: Zenith SSAVI
Competitor: None
Breakeven projection: 1st quarter
 1983

Boston

1.7 million
 478,000 +
 40,000
 9/80
 40,000 (CV est.)
 4% or less per month
 500 +
 \$22.95
 (Includes Nightview)
 weekdays—7 p.m.-6 a.m.,
 weekends—3 p.m.-6 a.m.
 (Adult late night fare)
 Same
 STAR
 Same

Wometco Home Theater

New York/New Jersey

ADI: 6.4 million
Homes passed by cable: 1.88 million
Unfranchised homes: 2.4 million
STV Launch: 3/77
Subscribers: 110,000
Disconnects: 5%/month
Monthly growth: 0
Fee: \$21 (Includes late
 night adult fare)
Hours: weekdays 8 p.m.-3 a.m.
 weekends 1 p.m.-3 p.m.
 Hours rise to 20/day and
 sub fee to \$22.95 in March
Equipment: Blonder-Tongue
 (nonaddressable)
Competitor: None
Breakeven projection: early 1983

Philadelphia

2.4 million
 848,240
 600,000
 18,000
 7-8%/month
 0
 Basic: \$21
 Adult tier: 5.95
 Same
 Blonder-Tongue
 (addressable)
 SelecTV
 Market anomalies
 prevent projection

Ironically perhaps, it was equipment problems that bedeviled Preview. Billing software designed elsewhere proved unequal to more than 10,000 subscribers, well under the total needed for turnaround.

"We couldn't tell who was a paying subscriber," remembers one task force member. "The addressable computer would shut off the bad pays, all right, but there was no way to let the billing computer know except manually."

"We didn't know the subscriber lifetime, the cost of adding subscribers, the effective marketing ... We had no good financial

Many believe the time has come to exit, sooner than planned if a buyer can be found and with fewer profits than planned if a buyer cannot be found.

information. None."

It is only in this quarter that Preview marketing took aim at new subscribers. Negative growth, says Garner, is now under control, thanks to a new Time-produced guide, pinpoint selling and Times' and others' most promising addition, late-night adult programming.

"We believe," Garner says stoutly, "that Boston remains a large, profitable market. As we get better, it will be more difficult for cable to take our subscribers away."

"We think we can make this an attractive business, even for Time Inc. If there were a buyer, he'd be more attracted to an efficiently run operation. So in that sense, yes, we are plumping up the markets for sale with our cost-cutting and streamlining."

"And if there's no buyer, we'll have well-run additions to Time Inc.'s inventory... if we have no choice..."

Wometco woe

While Time was reassessing its STV business last summer, Wometco Enterprises was doing the same thing (*CV*, 7/26/82, p. 19). Its Wometco Home Theater had gone into the black for the first time since Wometco Enterprises led the pack into STV in March 1977 with its launch in New York/New Jersey.

Charles Simons, the Wometco Enterprises director to whom the always thorny STV division was turned over in 1981, assumed at the time that WHT would stay profitable for the full year. He was wrong.

The bullet Simons willed WHT to bite this year has gotten even harder to swallow. Its trouble-plagued Philadelphia system was once the planned testbed for the multichannel pay service STVers look to for what even HEN's Jack Wyant terms "salvation." Now it is teetering on the edge of extinction.

Wometco had sought to buy Philadelphia's bankrupt WWSG, which leased its prime time for WHT. But the asking and offering prices were far apart. The state receiver supported a bid to nullify WHT's contract on the basis that it made attracting a new buyer more troublesome. The court supported the move, and Wometco now is appealing.

The local papers have covered the fight, with the predictable effect on subscriber growth. In addition, "our marketing has cooled," Simons says. "The more we invest, the more we

STV offers 'no room to roam. It's all or nothing. That's why multichannel STV is the salvation of the business.'

Jack Wyant,
president,
Home Entertainment Network



stand to lose if a new owner doesn't want to lease STV time. We will not expand beyond our current inventory of (about 25,000) boxes."

Even without the public brawling, the market has problems. The economy is blamed for the fact that 42 percent of receivables are more than 120 days late. Like other STV operators facing competitors, WHT, fighting SelecTV, used its installation fee as a marketing ploy. To get rid of a perceived entry barrier, it let new subscribers spread the \$60 charge over six months. With that qualifier gone, churn soared.

A collection agency has been hired and a \$200 deposit is required of anyone who doesn't pass a credit check. (Turndowns, once 3 percent, now are running 25 percent.)

In WHT's flagship market, New York/New Jersey, Wometco has been pursuing pirates as has Time's STV division. "Turn pay TV into free TV," advertised a Long Island black marketer against whom Wometco has won a temporary restraining order. "Give a pay TV

decoder for Christmas," invited one of the dealers Time is chasing in Cleveland.

The two also share software woes. Subscriber growth and disconnect rates are virtually unavailable for New York and New Jersey, the company has decided, until billing snafus are untangled.

The write-off of bad debt led to a \$99,000 loss in the third quarter for the division. "We're going to clear this up this year," Simons says firmly, and Wall Street already has been prepared for a hard knock to the company's 1982 earnings.

And the long term? Worst case, Simons figures, is a closing of the Philadelphia operation.

Like Time Inc., though, Wometco is candid about its wish that a buyer would come along. Capital expenditures on STV have been cut from about \$10 million this year to "substantially less" in 1983, and spokesmen won't even discuss the overall budget for the division.

"Maybe STV will be a big winner," Simons says. "But there are other fields for us that offer a better return on investment. There are people who see a long-term future in STV. We don't."

Adds WHT President Harold Brownstein, from what was once to be the administrative headquarters of an STV network covering the Northeast, "We're certainly giving it 100 percent. But sometimes you get an Atari, sometimes not."

Realism in St. Louis

Cox Communications entered STV tardily and—as TV Operations Executive Vice President Mike Kievman is quick to admit—warily.

The company bought STV-authorized KDNL-TV in St. Louis as its sixth addition to a successful string of broadcast operations. The station had been bobbled from shoppers Time Inc. (coincidentally, it would have been Time's first STV vehicle) to Buford TV, a commercial broadcaster and STV operator, and finally, for a deftly negotiated \$13 million price tag, to Cox.

At the time, the city had a languishing lawsuit against Melhar Corp., holder of the franchise to its unbuilt cable system for some 13 years. TCI entered the picture late in Melhar's tenure and, as majority owner, hammered out a deal with the city to drop its suit in return for a redesigned proposal. The city agreed and, as this is written, an announcement that TCI has a go-ahead is considered a given, once the

Board of Aldermen focuses on post-holiday business.

(It is a market of coincidences. Cox once was persuaded that an alliance between Cox Cable and Melhar was the entry it wanted, too.)

If St. Louis is to be cabled soon—and TCI will doubtless be held to a rigid construction schedule—that could affect substantially the length of the STV track for Cox. It is already disappointed with the 11,000-subscriber sales volume there, Kievman says. "Frankly, it's not moving. Last month, it was very strong, but that was because we cut the installation fee from \$50 to \$25. As soon as it went back up, response dropped.

"We don't know where we'll cut it off. We know where we have to be—at 50,000 or so—and we'd hate to get to 40,000 and quit. But you can't wait with these things. If there's a problem, we'll cut our losses.

"We can cancel our own contract any time," he added, with the obvious satisfaction of someone who has a ready alternative in traditional commercial TV service.

"We had the right idea a year ago," he concluded. "This is the first time we've ever faced something like this. But we're realistic."

Veteran STV manager Don Pascarella runs the Cox operation in St. Louis. Asked what he'd do if cable comes, he chuckled a bit mournfully and said, "Is 'Punt' a good answer?"

Turning serious, he noted that he has, for years, counseled his past and current employers that the best thing an STV operator can do is establish a retention program immediately. "We're not kidding ourselves. If we can break even and retain the 50,000 subs that offset our initial investment and then start replacing that money, there may well be a market here." From the earliest days, he said, the Cox Preview budget has allocated 1.5 percent monthly of its ad budget to retention efforts.

United, overall

Considering his new role as the STV industry's top statesman, Jack Wyant, president of Home Entertainment Network, is pretty candid in his assertion that only some STV operators are going to make it and that he's going to be one.

He seems candid about most things. At 36, he is a member of

Home Entertainment Network (United Cable)

Minneapolis/St. Paul	Chicago	Cincinnati
ADI: 1,100,000	3,000,000	700,000
Homes passed by cable: 114,000+	288,000+	152,550
Unfranchised homes: 280,000	1.15 million	N.A.
STV Launch: 9/82	10/81	2/80
Subscribers: 20,000 (end-Sept.)	61,000	39,000
Disconnects: negligible	4.6%	5.8%/mo.
Monthly growth: 0.25,000/ month #1	2,000/mo.	0
Fees: Basic—19.95	21.95	20.95
Sports—9.95	—	—
Adult tier—9.95	5.95	4.95
Hours: 3 p.m.-4 p.m.	9 a.m.-5 p.m.	12:30 p.m.-8:30 a.m.
Equipment: SSAVI	SSAVI	Oak
Competitor: None	Oak	None
Breakeven projection: prior to end of fiscal year 5/31/83	0	

STV's old guard, having entered the business when optimism reigned. He retains his. "Of course, it's hard for you to know whether I'm optimistic ... or just oblivious," he remarked at the end of an upbeat evaluation of HEN.

Such frankness and an apparently genuine thoughtfulness brought him to the fore of the industry as the STV Association's 1983 chairman. The traits also allowed him, said one Wall Street analyst ungrudgingly, "to convince (United Cable Chairman) Gene Schneider that all STV's problems are temporary."

Wyant went with HEN to the United fold when the MSO paid \$20 million for 80 percent of the Buford TV subsidiary earlier this year.

United Cable could have found itself on the same route Time Inc. followed. When franchises loomed closer than predicted or potent competitors promised to delay STV grants, the company instead wound up buying HEN, an existing STV company operating in Cincinnati and Chicago.

The founding owner, Buford, had found the business a drain. United at first planned to buy only 6-10 percent of it, distancing itself from the negative earnings impact. But because it took a majority on the HEN board, United was required to consolidate HEN's results anyway and, in the end, went ahead and purchased the 80 percent it would have bought once the operation had hit breakeven.

Preview (Cox Communications)

St. Louis, Mo.

ADI: 1,020,000
Homes passed by cable: Approx. 460,000 (Cox est.)
Unfranchised homes: 175,000
STV Launch: 6/82
Subscribers: approx. 10,000
Disconnects: 3%/monthly
Growth: 2,600/monthly
Fees: Basic—19.95 Adult tier—4.95 (Eros)
Hours: 7 p.m.-up to 6 a.m.
Equipment: Zenith
Competitor: None
Breakeven projection: N.A. (40- 50,000 subs)

'STV has a stigma now that slows the buying decision. Almost everyone inside the business has soured on it.'

Mike Klein,
STV broker

Not unexpectedly, United did show a loss in the first quarter of its fiscal year 1983 (June-August 1982). It was two cents a share compared to a 23-cent gain in the same period last year. Kidder, Peabody analyst Barbara Dalton Russell, in a laudatory research report on the company in October, estimated that HEN accounted for a 15-cent loss in the quarter, new cable systems for 22 cents. Existing systems posted an earnings increase of 35 percent, so the overall loss was largely neutralized.

United, of course, has been on a franchise march. A winning streak that could not have been entirely predictable (based on a less than stellar performance in the past) caused a blip of concern on Wall Street's radar. Would it regret the diversion of funds to HEN?

The capital commitments it will make to new building caused Kidder, Peabody to lower its earnings estimates for the MSO this year but to look to substantial appreciation in the value of the stock by 1986. One plus, says analyst Russell: "HEN will contribute \$45 million in cash flow (and could sell for as much as three times that cash flow)."

United President Fred Vierra spent part of his first two weeks on the job meeting with HEN's Wyant. He says the company's STV evaluation is underway right now and that economizing is in order "just because it's prudent—not to save up for cable construction."

"This may be in the category of famous last words," Vierra says lightly, "but we believe at least two of our three markets—Minneapolis and Chicago—offer long-term potential. And even Cincinnati may be able to attract enough of the 200,000 or so homes that will probably never be cabled to have a long run."

Wyant exults, "Up to the most recent numbers in October, we were 7 percent ahead, bottom line. We're going to be able to keep our commitment to be in the black by the end of fiscal year 1983."

Conceding HEN was off by 10 percent on its projected \$60 million in revenues for 1983, he avers, "We're concentrating less on revenues or subscriber growth than on growing in profitability."

One route to that goal—and a handy demonstration of United's commitment to HEN—is the development, through United's data processing group, of a new computer system for STV markets ravaged, as

'Maybe STV will be a big winner. But other fields offer us a better return on investment. There are people who see a long-term future in STV. We don't.'

Charles Simons,
assistant to the president,
Wometco Enterprises

were others, by faulty tracking. "You couldn't draw the conclusion, based on the company's conduct, that United plans to withdraw from this industry," Wyant says.

Assessing the markets

HEN's most recent launch was Minneapolis in September. Growth there was "STV's biggest success story, I would think," says Wyant of the 25,000 subs added in the first 30 days. (Both he and Vierra are quick to remark that experience is too brief to draw conclusions.)

HEN counts heavily on turning Minneapolis into a two-channel STV operation. It has joint ventured with the Minneapolis North Stars and Twins in a sports channel that is to precede "a second channel." The number two vehicle will be PBS' second station in the market, assuming FCC go-ahead comes through as HEN expects it to early next year. Now the games are offered as a tier, with non-takers scrambled out. An adult tier is also popular and, so far, 17 percent of subscribers take all three offers.

In Chicago, where HEN shares the turf with Oak, penetration for each lags in a way that Vierra regards as "a complete mystery. It should be for both of us what Los Angeles is to ON and SelecTV."

The disconnect research now being done, however, concentrates not on Chicago but on Cincinnati, HEN's oldest and most troubled market. Focus groups and field research are underway and have already demonstrated the main reason for laggard growth to be the availability of cable.

"That's not inconsistent with our business plan," Wyant remarks, characterizing STV again as a pre-cable bridge. "More troubling for us in that market is the 13.9 percent unemployment. The number two reason that people don't subscribe is money."

HEN's longevity in Cincinnati rests partly on its expectation that 30 percent of the total market will never be cabled and partly on programming. It bound the Cincinnati Reds in an exclusive contract three years ago. And Wyant allowed as how he thought Warner Amex might pick up its adult programming for cable carriage into the doughnut of systems that surround the city.

But STV's major problem, he said, is that it offers "no room to roam. Subscribers can't downgrade or try something else. It's all or nothing. That's why multichannel STV is the salvation of the business. STV's lifespan is limited without it."

Contingency planning

HEN looks to multichannel STV (as ATC did in Dallas before it), to offering equity involvement to local sports interests in return for exclusive carriage and to expanding STV programming to 24 hours on the two stations to be transferred from Buford to United as ways to weather the competitive and economic storm around STV.

Time Inc. and Cox figure their STV operations have the virtue of serving as pay-per-view and addressability testbeds. (Times' decision to carry *Pirates of Penzance* stems from curiosity about the appeal of simultaneous STV and theatrical release—a question that gained significance with the announcement of HBO's plan to create a new motion picture studio with Columbia and CBS.)

Wometco and Time hope a DBS operator will find in their subscriber and administrative bases an attractive foundation to his own business. (WHT's Harold Brownstein makes the apt point that DBS aversion to such blandishments so far may stem from the same naivete about the daunting complexity of ordertaking and installation that STV'ers themselves once struggled with.)

And Cox looks benignly at the option of turning its KDNL into a fully commercial station instead of a prime-time STV vehicle.

All have been propelled—call it impulsion or compulsion—to a hard-won levelheadedness about STV. It was, as Mike Kievman says of St. Louis itself, a rollercoaster. Or as broker Mike Klein puts it, "an over-romanticized business."

As the STV window gets narrower, the view gets clearer, if not necessarily better. ■

Arbitron 1982 penetration counts

Date	Cable homes	Percent of TV homes
February 1982	20,693,446	25
May 1982	21,041,327	26
July 1982	21,179,525	26
October 1982 (released last week)	24,756,000	30

Arbitron says

Cable penetration up to 30 percent of TV households

NEW YORK—Recent Arbitron figures show for the first time that cable subscriber penetration surpassed 30 percent in 1982, confirming A.C. Nielsen's earlier count.

Arbitron, a Control Data subsidiary, counted 24.75 million subscriber households in 1982, approximately 30 percent of the nation's televised homes. Also, executives at the company say they have found a data technique that more accurately reflects the industry's progress.

Arbitron's number showing cable penetration as of two months ago, is 3.57 million homes higher than its July 1982 count. At that time, the company reported that 21.1 million homes, or 26 percent of U.S. TV households, had cable.

For most of 1982, Arbitron's counts have stayed in the 25-26 percent range. By contrast, A.C. Nielsen's July penetration count reached 27.88 million homes, 36 percent of TV households. Nielsen is expected to release its final 1982 cable figures soon.

Arbitron's sharp increase results from incorporation of data from 500,000 diaries in households around the country, with subscriber counts provided by operators. Until now, Arbitron based its figures solely on operator numbers. The changeover began after the company tried to convince operators to provide more timely numbers and found the results out of sync with separate estimates taken from diary research alone. But the company had another problem, according to Pete Megroz, sales and marketing vice president. Only 30 percent of operators getting Arbitron requests for counts responded.

"When we looked at the response rate, it became evident that there was a disparity there," he said. "We used the telephone much more, changed the letter we sent to them, simplified the questionnaire, asked operators for corroboration of figures—and that worked. We got the rate up to 50 percent. That meant half the people didn't care about what we were doing, rather than two-thirds. Even when you compare the results, we still had a

difference between that and our own diaries."

Under the new system, figures from the diaries are averaged on a 50-50 basis with subscriber counts in each of Arbitron's market areas. For example, if operators in one area reported 30

percent penetration and diaries revealed 40 percent, the result stands at 35 percent penetration, provided the area contains 50 diaries or more. If the area contains less, the penetration rate is determined by operator figures alone. Megroz estimates that 30 percent of the diaries are in cabled homes.

Bruce Hoban, research vice president at the Cabletelevision Advertising Bureau, calls the new process a step in the right direction for Arbitron. "It's a good improvement. What it's showing is that they're really getting close to other universe estimates. One thing they still can't account for is theft of service. The subscribers don't want to help you know."

Megroz agrees that the new count remains low on the number of subscribers pirating cable. "We're probably picking up some of it. Some people tell me signal piracy is as much as 25-30 percent penetration in some systems, but there's no way to tell that."

—Simon Applebaum

FNN campaign

Ads in New York Times, trade magazines ask, 'It's 2 p.m. Do you know where your money is?'

NEW YORK—The Financial News Network has initiated an aggressive advertising and promotional campaign under the direction of network President Norman Potter and Senior Adviser Richard Gilbert to attract financial community and corporate sponsors.

The campaign follows FNN's first anniversary and an announcement that it reaches up to 30 million viewers through cable television and UHF station affiliates. FNN recently opened new production studios on the ground floor of the Merrill Lynch building in the heart of the New York financial center.

The highlight of the ad campaign, a full-page ad in *The New York Times*, ran Dec. 8. Previously, the network ran full-page ads in several advertising trade publications announcing its latest affiliate agreements.

The New York Times ad featured a picture of Robert Metz, FNN's New York Bureau chief, a former *Times* financial writer. The tag line read, "It's 2 p.m. Do you know where your money is?"

The ad copy continued, "Today's financial news today. All day. Not the next day."

Senior Adviser Richard Gilbert, recently hired by FNN to design and implement advertising, promotion and marketing plans, said FNN will buy space in several leading business and cable television trade publications beginning in early 1983. He also said that copies of *The New York Times* ad are being distributed to a select group of individuals in the financial and ad worlds.

Gilbert told *CableVision* that the *New York Times* ad copy line, "Today's finan-

cial news today," encapsulated the value of FNN. "More than half of what becomes a headline in the *Wall Street Journal* is seen on FNN the day before," he said. Gilbert added that FNN was not directly competing with the *Wall Street Journal*, but could be seen as a "supplement" to it.

FNN President Norman Potter told *CableVision* the network's viewers will be "absolutely amazed" by planned changes in FNN over the next 90 days.

These developments include:

- A possible move to a "more compatible" satellite from its current Westar TV transponder;
- The hiring of FNN's first program director. Potter said he is searching for an experienced programmer with heavy production experience at the local level who has brought a station "from number three to number one";
- Originating at least three segments from the New York studio. Potter said "eventually" about 40 percent of FNN's programs each hour will originate from the Merrill Lynch production facility; and
- Adding sophisticated computer graphics to the network's on-air image by mid-January.

Changes in the network's schedule and look and its increased advertising push are ways to show the financial community "we are your service," Potter explained.

Gilbert said response to *The New York Times* ad has been "good." He said FNN has received "numerous" requests for information from potential advertisers and members of the financial community.

—David Stoller

Business

ing the teletext decoder, and that Matsushita was the "most responsive."

"It makes great sense for us to become an aggressive developer of hardware," Levin said. For too long, he added, American cable companies have stood by and waited for the hardware industry to determine technical developments.

ATC, Levin said, is co-developing a pole-attached addressable decoder with Toshiba, another Japanese manufacturer.

Time Inc. officials said the decoder price would be at the "low end" of a \$150-\$200 price range.

Long-term, officials said, the Matsushita-designed decoder will function as an integrated component compatible with personal computers designed by other manufacturers, including IBM and Apple.

Neither Time Inc. or Matsushita has marketing plans for the decoder at present, the companies said.

The Time Video Group has been working on the plans for its teletext operation with a full-time editorial staff for 18 months. The service has 5,000 pages of information and entertainment and eventually will be capable of providing shopping and banking services using a hybrid of cable and telephone connections.

Officials said that plans call for the teletext service to be offered to cable subscribers for \$5-\$10 a month. The service will carry advertising, which officials said will provide a substantial portion of the service's income.

—Gary Rothbart and David Stoller

United Media survey

New survey results indicate 'cautious optimism' toward new technology

NEW YORK—Less than half of the respondents in a nationwide survey would use cable television to shop, bank or vote at home, according to results released last week by United Media Enterprises.

The Scripps-Howard subsidiary took a nationwide random sample of 1,000 persons, including 300 leaders of American media.

The survey concluded that media leaders, including about 100 cable programming directors, spend less leisure time with friends or home-centered activities such as gardening as does the general public. The survey said media leaders do less volunteer work and spend more time reading magazines than does the general public.

"We can expect a cautious optimism regarding the use of new media technology," said John Crothers Pollock, president of Research & Forecasts, which conducted the study for Scripps-Howard.

"Americans are fascinated by technology, and the 46 percent who say they are likely

This announcement appears as a matter of record only.

November 1982

\$2,800,000

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Business

to use interactive shopping capabilities on cable, if they can afford it, are a sizeable percentage willing to try a new time-saving service," Pollack said.

"Saving shopping time is of special interest to those with substantial responsibility loads, in particular, dual-career families.

"At the same time, the public is presented with a bewildering array of choices, and a majority remain somewhat reluctant to jump directly into interactive cable shopping, citing a wish to do things themselves, interact with people, and a slight, though not overwhelming, distrust of gadgetry.

"Interactive cable shopping is taken seriously, but it will be some time before a clear majority of the population begins to take advantage of these services," Pollock explained.

Those willing to use interactive cable services tend to be younger than 50, with some college education. Seven of 10 teenagers and single adults surveyed said they would use it. Six of 10 dual-career parents and single parents said they would use the services. Yet, only three of 10 older parents with adult children to childless couples said they are interested.

The same reasons for resistance to interactive services were cited in the study. Thirty percent of the respondents said they prefer to shop or bank in person; 14 percent don't like the idea; 13 percent want to get out of the house; 9 percent don't trust technology; 5 percent believe interactive services are too impersonal; and 5 percent

Daily Participation in Most Popular Activities

	TEENAGERS	SINGLES	AGE 65 AND OVER	MARRIED, NO CHILDREN	PARENTS WITH GROWN CHILDREN	TRADITIONAL PARENTS	DUAL-CAREER PARENTS	SINGLE PARENTS
All figures percentages								
Watch television	89	67	81	70	73	74	72	62
Read newspaper	49	62	87	63	76	65	68	66
Listen to records, tapes	78	76	20	56	31	42	46	50
Exercise	54	48	34	24	28	35	30	39
Talk with friends	34	32	30	33	26	32	29	37
Read books	20	18	35	30	28	17	27	25
Gardening	11	6	30	19	29	34	24	9
Read magazines	34	21	20	14	21	14	14	12
Fix, building in the home	17	7	12	25	23	24	22	14

Source: The United Media Enterprises Report on Leisure in America.

aren't familiar with interactive cable services.

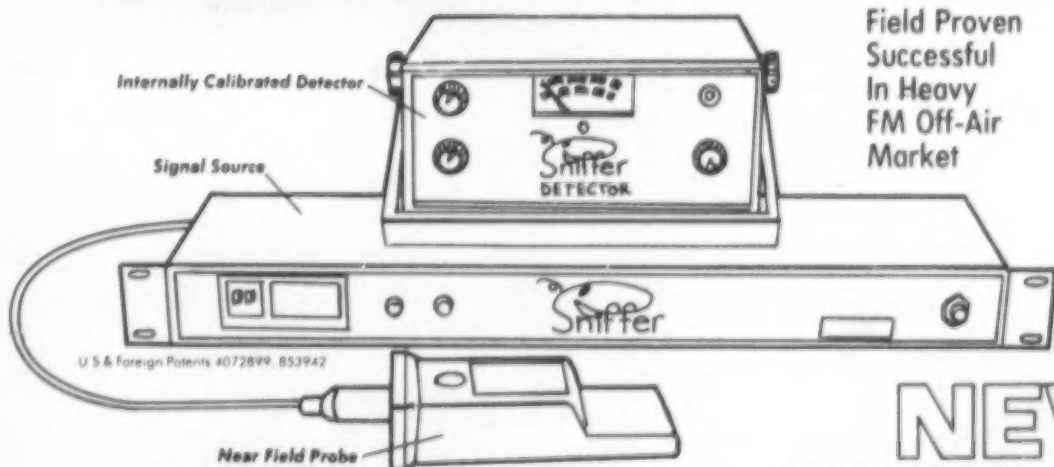
Of the 345 persons that were asked why they subscribe to cable television, 43 percent said they like network television and want more of their favorite entertainment; 50 percent said it was because network television doesn't offer everything

they want; and 8 percent said it was because they didn't like network television.

Of approximately 100 cable programming directors surveyed, 77 percent said cable will maintain its lead in the face of increasing competitive technologies, and 8 percent said cable will be surpassed.

—Gary Rothbart

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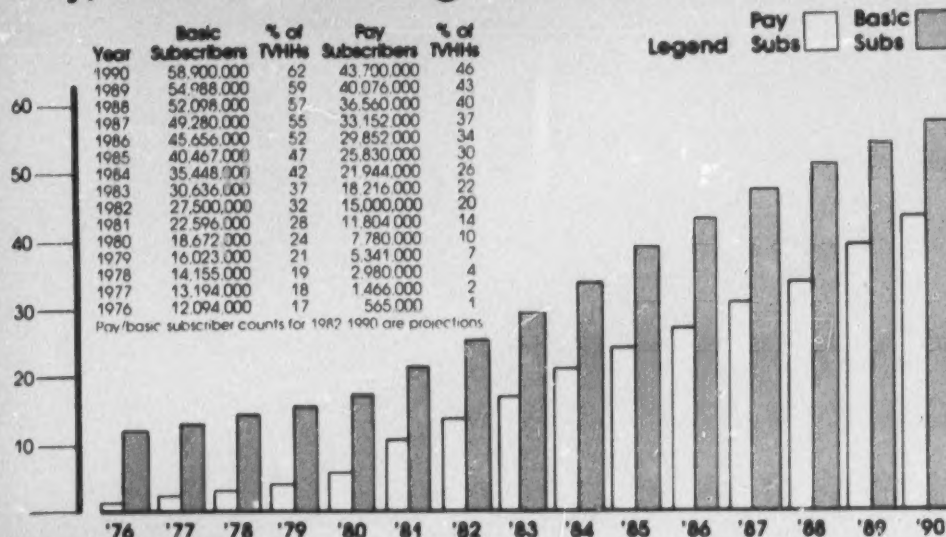
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Cable stats

Pay/basic cable growth



Cable barometer

Television households (TVHH) 82,100,000
 Homes passed by cable (HP) . 45,310,421
 Percent of TVHH passed by cable 55.2%
 Basic cable subscribers .. 26,991,845
 Percent of TVHH with basic cable 32.9%
 Percent of HP with basic cable 59.6%
 Pay cable units 14,550,000
 Percent of TVHH with pay cable 17.7%
 Percent of HP with pay cable 32.1%
 Percent of basic subs with pay cable .. 53.9%

Figures are as of October 1982

National cable advertising

This chart lists national advertising sales by the basic cable networks during November 1982.

Network/Client	Status	Network/Client	Status	Network/Client	Status
ARTS (Hearst/ABC)		Nestle	Renewal	Villa Banfi, USA	New client
American Egg Board	New client	Procter & Gamble	Renewal	Whitman Candy	Renewal
Exxon Corp.	New client	Reynolds Metals	Renewal		
Norcliff Thayer	Renewal	Richardson-Vicks	Renewal	Financial News Network	
Procter & Gamble	Renewal	Selchow & Righter	Renewal	Air California	Renewal
Warner Communications (Atari)	New client	Sunkist	Renewal	Airborne Airfreight	Renewal
Weight Watchers	Renewal	Thompson Medical	Renewal	Alaska Land Leasing	Renewal
		Trans-World Airlines	Renewal	American Express	Renewal
BET		Viking Sewing Machine	Renewal	Andrew Peck & Associates Brokerage	Renewal
Amtrack	Renewal			Blanchard Communications	Renewal
Anheuser Busch	Renewal	Daytime (Hearst/ABC)		Boston Stock Exchange	Renewal
Campbell Soup	Renewal	American Egg Board	New client	Business Week	Renewal
Carson Products	Renewal	Del Monte	New client	Capital Preservation Fund	Renewal
Coca Cola	New client	General Mills	Renewal	Cardiff Publishing Co.	Renewal
Ford	Renewal	Golden Grain Macaroni	Renewal	Celestial Acres	Renewal
General Mills	New client	H.J. Heinz	Renewal	Charles Schwab & Co.	Renewal
IBM	Renewal	Kraft	New client	Colonial Penn Insurance	Renewal
Kraft	Renewal	North American Phillips	Renewal	Commodities Magazine	New client
Mobil	Renewal	Sears	Renewal	Conti Commodity	Renewal
PepsiCo	Renewal	Weight Watchers	Renewal	Fidelity Insurance	Renewal
Pillsbury	New client			Fisher Stereo	Renewal
Sears	Renewal	ESPN		Forbes Magazine	Renewal
U.S. Army	Renewal	American Coal Foundation	New client*	Franklin Mint	Renewal
Westinghouse	New client	Avon	New client	International Trading Group	Renewal
		Big A Auto Parts	New client	Investment Rarities Inc.	Renewal
Cable Health Network		Caravatt Communications	New client*	Kiplinger	Renewal
Campbell Soup	New client	Dunlop	Renewal	Lind-Wallock Commodities	Renewal
Dorsey Laboratories	Renewal	The Gap	Renewal	Lloyd's Bank of California	Renewal
Eastman Kodak	Renewal	General Motors	Renewal	Lowes Hotel	New client
Procter & Gamble	Renewal	Hearst/ABC	Renewal	Merrill Lynch	Renewal
		Honda	New client	National Geographic Society	Renewal
CBN Cable Network		Inveco	Renewal	The New Report	Renewal
Allen Products	Renewal	Kendall Oil	Renewal	North American Coin	Renewal
American Express	Renewal	Members Only	New client*	OTC Review	Renewal
Amway	New client	Mennen	Renewal	Paulson Investment Co.	Renewal
Beiersdorf	New client	Paramount Pictures	Renewal	Philadelphia Stock Exchange	Renewal
Corning Glass	Renewal	Pennzoil	Renewal	Princess Cruises	Renewal
Dart & Kraft	Renewal	Prince	Renewal	Prudential-Bache	Renewal
Dow Chemical Co.	Renewal	Saunders Leasing	Renewal	Quick & Reilly	Renewal
Eastman Kodak	Renewal	Sports Illustrated	Renewal	Remote Computing Group	Renewal
Hanes	Renewal	Subaru	Renewal	Stock Market Cycles	Renewal
Jeffrey Martin	Renewal	Tennis Magazine	Renewal	Technology Illustrated	Renewal
Kal Kan	New client	US Games	Renewal		
Nabisco	Renewal				

Cable stats

Network/Client	Status	Network/Client	Status	Network/Client	Status
Tri Fund	Renewal	Olympic Stain	Renewal	Del Monte	Renewal
Value Line	Renewal	Paterno Imports	Renewal	Duracel	Renewal
Wellington Financial Corp.	Renewal	Radio Shack	Renewal	The Gap	Renewal
West Coast Metals	Renewal	Ralston Purina	New client	Harlequin Books	New client
WFI Offshore Banking	Renewal	Rockwell International	New client	Jeffrey Martin	Renewal
William O'Neill Inc.	New client	Skill Tools	New client	Mobile Oil	Renewal
National Jewish Television		Smithsonian Magazine	New client	Noxell	New client
Crazy Eddie	Renewal	United Van Lines	Renewal	Playtex	Renewal
El Al Airlines	Renewal	Video Magazine	New client	Stark	Renewal
Goody Products	Renewal	Wall Street Journal	New client		
Israel Development Authority	Renewal	SPN		The Weather Channel	
Israel Coins and Metals	New client*	Bristol-Myers	New client	Anco	New client
The Jerusalem Post	Renewal	Eastern Airlines	New client	American Motors	New client
Sheraton	New client	Sheraton	New client	Champion Auto Parts	New client
Satellite News Channel I		TeleFrance		Duracell Batteries	New client
Allied Fiber	New client*	Air France	Renewal	General Motors	New client
American Motors	Renewal	American Fur	Renewal	Pillsbury	New client
Business Week	Renewal	Chanel	Renewal	Prudential-Bache	Renewal
Chrysler	Renewal	Food & Wines of France	New client*	Quaker Oats	Renewal
Eastman Kodak	New client	Gallerie Lafayette	New client*	Sears	New client
Ford Motor	Renewal	Yves St. Laurent	New client	United Airlines	New client
General Motors	Renewal	USA Network			
Honda Cars	New client	Brunswick	Renewal		
Kraft	Renewal				

* designates new to network advertising.

Cable programming services subscriber counts

Satellite-fed basic services	Affiliates*	Subscribers*	% change in homes from 10/31
ACSN: The Learning Channel	283	2,148,960	+7.4
Alpha Repertory			
Television Service (ARTS) ¹	1,725	8,000,000	N.C.
Black Entertainment Television (BET)	131	2,306,973	-8.4
Cable Health Network (CHN)	540	4,650,000	+13.4
Cable News Network (CNN)	2,945	16,660,000	+5.3
CNN Headline News	323	2,245,000	+8.2
Cable Satellite Public Affairs Network (C-SPAN)	1,000	11,000,000	+4.8
CBN Cable Network	3,325	18,600,000	+2.2
Daytime	533	7,200,000	N.C.
Dow Jones Cable News	75	750,000	+15.4
Electronic Program Guide (EPG)	N.A.	874,786	+6.5
Entertainment and Sports Programming Network (ESPN)	4,891	19,805,865	+2.7
Eternal Word Television Network (EWTN)	38	689,000	+2.8
Financial News Network (FNN) ¹	748	6,825,000	+30.3
Modern Satellite Network (MSN)	404	5,774,240	-4.2
Music Television (MTV)	900	7,200,000	+6.7 (11/15)
National Christian Network	70	1,242,905	-26.4 (9/82)
National Jewish Television (NJT)	105	2,257,850	+1.0
Nickelodeon	2,100	9,500,000	+5.5
North American Newstime/The Travel Channel	N.A.	N.A.	N.A.
PTL Television Network	600	6,500,000	N.C.
Reuters News View	398	4,000,000	+14.3
Satellite News Channel I (SNC)	550	5,400,000	+74.2
Satellite Program Network (SPN)	360	5,200,000	+3.7
SPN Television Network ²	199	25,531,400	N.C.
Trinity Broadcasting Network	235	2,300,000	N.C.
USA Network	2,300	13,000,000	N.C.
The Weather Channel (TWC)	678	7,000,000	+16.0
WGN	3,669	10,494,082	+11.1
WOR	694	4,456,857	+0.9
WTBS	4,813	24,157,000	+3.6

Satellite-fed basic audio services

Lifestyle	105	1,000,000	N.C.
WFMT	167	917,351	+4.9

Satellite-fed pay services

Bravo	47	79,123	N.C. (10/31)
Cinemax ³	1,500	2,000,000	N.C.
The Entertainment Channel (TEC)	50	45,500	+1.1
EROS	18	40,000	-39.4
GoldVision	160	120,000	N.C.
Home Box Office (HBO) ³	4,300	11,000,000	N.C.
Home Theater Network Plus (HTN)	200	155,000	N.A. (6/82)
The Movie Channel (TMC)	2,350	2,300,000	N.C.
The Playboy Channel/Escapade	193	299,284	N.C. (10/31)
Showtime ³	2,000	4,000,000	+14.3

Regional sports services**

	Affiliates*	Subscribers*
Action Sports Network	N.A.	N.A.
Bay City Interconnect	32	483,000
Madison Square Garden Network	47	1,400,000
PRISM/Philadelphia	73	322,528
PRISM/New England	80	20,000
SportsChannel	33	243,000

* Affiliate and subscriber counts are as of 11/31/82 unless otherwise noted.

¹Subscriber count denotes households receiving signal.

²Total SIN reach. Total Spanish-speaking households: 3,075,900.

³This month's figures are approximations.

N.C. designates no change.

N.A. designates not available.

**All regional sports networks have no percentage change. The information has been collected for the first time in Cable stats.

Announced satellite-fed cable services

ABC/ESPN Pay Service	
Almi Group Network	
Apollo Entertainment Television	
The Buena Vision Channel	
Cable Newspaper Corp.	
The Channel Black	
Christian Media Network	
Cinematica	
The Community Channel	
The Disney Channel	
Family Programming Network	
The Games Network	
Home Music Store	
The Job Channel	
Kidvid Network	
Rock 24 (Lewmark Productions Music)	
Magicable	
Nashville Network	
National Jazz Network	
PBS Cable	
Penthouse Entertainment Network	
Satellite News Channel II	
The Silent Network	
Sitcom Channel (Channetainment)	
SPN/International Network	
SPN/Financial-Religious Network	
SPN/Classic Movie Network	
SPN/How-To Network	
Top Entertainment Network	
UHF Cable Network	
The Vanguard Network	
Video Concert Hall	
Window	

Projected launch date

T.B.A.	
T.B.A.	
T.B.A.	
1st quarter 1983	
1/83	
1st quarter 1983	
relaunch T.B.A.	
T.B.A.	
T.B.A.	
2nd quarter 1983	
T.B.A.	
1st quarter 1983	
1983-84 launch	
T.B.A.	
1/83	
6/83	
3rd quarter 1984	
2/83	
1982	
T.B.A.	
T.B.A.	
2nd quarter 1983	
3/83	
1st quarter 1984	
2nd quarter 1984	
2nd quarter 1984	
2nd quarter 1984	
2nd quarter 1984	
T.B.A.	
1/83	
2nd quarter 1983	
T.B.A.	
T.B.A.	